

Cases Report

For Trustees and Attorneys

The Cases report presents information from the court's database with a variety of selection criteria for case management and tracking.

- STEP 1** Click on the Reports hyperlink on the CM/ECF Main Menu (See Figure 1.)



Figure 1

- STEP 2** The **REPORTS** screen displays with a list of reports that can be generated (See Figure 2.)



Figure 2

- ◆ Click on the Cases hyperlink.

STEP 3 The **PACER LOGIN** may display (See Figure 3).

PACER Login

Notice
This is a **Restricted Web Site** for Official Court Business only. Unauthorized entry is prohibited and subject to prosecution under Title 18 of the U.S. Code. All activities and access attempts are logged.

Instructions
Enter your PACER login and password. If you do not have a PACER login, you may register online at <http://pacer.psc.uscourts.gov>. If you have a CM/ECF filer login and password, and would like to automatically log in to PACER each time you log in as a filer, check the box below.

☐ Make this my default PACER login
After checking this box, you will only need to use your CM/ECF login and password, either for electronic filing or for viewing documents via PACER.

Authentication

Login:
Password:
Client code:

Notice
An access fee of \$0.08 per page, as approved by the Judicial Conference of the United States, will be assessed for access to this service. For more information about CM/ECF, [click here](#) or contact the PACER Service Center at (800) 676-6856.

CM/ECF has been tested and works correctly with Firefox 2.0, Internet Explorer 6.0 and 7.0.

Figure 3

NOTE: The Public Access to Court Electronic Records (PACER) program provides access to CM/ECF users. Logins and passwords can be issued by registration with the PACER Service Center. Current PACER logins and passwords will be accepted by the CM/ECF system. Note the information that is provided to the user on the screen above.

- ◆ Enter your PACER assigned **Login** and **Password** (These fields are case sensitive).
- ◆ Enter the **Client Code**. This optional field is used for billing by PACER users. The data will be included in PACER billing reports.

NOTE: If you click in the **Make this my default PACER login** box, your login will automatically appear each time you attempt to access PACER. If you click on the **[Reset]** button, all entries will be cleared. To change the client code within a session, go to Change Client Code under the Utilities Menu.

- ◆ Click on the **[Login]** button.

STEP 4 The **CASES REPORT** selection screen displays. (See Figure 4.)

Figure 4

- ◆ The following fields are available for selecting/entering criteria for generating the Cases Report:
 - **Office** – Allows you to specify the divisional office activity you want cases to be included on the report. The default is all offices.
 - **Case Type** – The choices are **ap** - Adversary Proceedings or **bk** - Bankruptcy. The default is all cases.
 - **Chapter** – Cases can be selected by Chapter **7, 9, 11, 12, 13, 15** or **304**. The default is all chapters.
 - **Trustee** - List of trustees. The default is blank for all.
 - **Date Type** – Allows you to specify which date is used when generating the report. The choices are **Filed, Entered, Discharged, Dismissed, Closed, or Converted**. The default is Filed Date.
 - **From/to** – Enter a beginning and/or ending date. The default is the current date. For one day's activity, the dates should be the same in both fields. Enter dates by MM/DD/YY or MM/DD/YYYY.
 - **Open cases** – You can restrict activity by open or closed cases. A check mark is defaulted in this box.
 - **Closed cases** – The option to include or exclude closed cases is available. The default in this box is no Closed cases.

- **Party information** – Placing a check mark in this box will allow you to include additional party information along with each party(s) name (i.e., address, SSN, and TAX ID).
 - **Sort by** – Allows you to select up to three sorting order sequences for the report. The choices are **Filed Date**, **Entered Date**, **Case Number**, **Case Type**, **Office or Trustee**. The default is Filed Date.
 - **Output Format** - Formatted Display or Data Only.
 - **Make these options by default** - Checking the box will save the options selected.
- ◆ The **[Clear]** button will reset all fields to their default values.
- ◆ After entering your criteria, click on the **[Run Report]** button.

STEP 5 The **CASES REPORT** displays next. (See Figure 5a.) All reports can be printed by clicking on the browser's Print button.

Cases Report for 8/26/2008						
U.S. Bankruptcy Court						
Western District of Kentucky						
Case No. Related Case Info	TP	Ch	Party Info	Judge Trustee	Dates	Other Info
08-30033	bk	7	Gummy Bear	Lloyd Wheatley	Filed: 08/13/2008 Entered: 08/13/2008 Discharged: 08/13/2008	Office: Louisville Assets: No Fee: Paid County: Jefferson
08-30034	bk	7	Annie M. Green		Filed: 08/26/2008 Entered: 08/26/2008	Office: Louisville Assets: No Fee: Paid County: Jefferson
Total number of cases: 2						
<input type="button" value="Open cases only"/>						

Figure 5a

- ◆ The following information will be displayed on the Cases Report:
- **Case No./Related Case Info** – Displays the assigned case number, chapter, and debtor. Clicking on the case number hyperlink will allow you to generate a Docket Report.

If the Case Type is an Adversary Proceeding (**ap**), the “Lead” case number appears beneath the adversary case number hyperlink.

- **Tp** (Type Proceeding) – Displays either **ap** or **bk**.
- **Ch** (Chapter) – Displays either **7, 9, 11, 12, 13, 15** or **304**.
- **Party Info** – Displays the debtor (and joint debtor) information for bankruptcy cases. Plaintiff information will also be displayed for **ap** cases. An additional row will be displayed for some lead bankruptcy case information.
- **Judge/Trustee** – If there is a trustee on a bankruptcy case, the name appears directly below the judge’s name.
- **Dates** – Date information will include the dates the proceedings were either **Filed, Converted, Dismissed, Discharged, Closed, or Entered**.
- **Other Info** – Other information may include the divisional office, asset designation, fee status and county.

- ◆ Clicking on any of the Case Number hyperlinks will display the **DOCKET SHEET** screen, allowing you to enter criteria for generating the Docket Report. (See Figure 5b.)

Docket Sheet

Case number

☒ Filed to

☐ Entered

Documents to

Include:

☒ Terminated parties

☐ Links to Notices of Electronic Filing

Document options:

☐ Include headers when displaying PDF documents

☐ View multiple documents

☐ Create Appendix

Format:

☒ HTML

☐ Text

Sort by

☐ Make these options my default.

Figure 5b

NOTE: Refer to the **DOCKET REPORT** module in your CM/ECF Student Guide for more information on the Docket Report.